

Chapter 15

Searching

Overview

The Toolkit provides support for searching name, subject, accession, and description records. You can search data fields in any of these records, and search linked data in accession and resource records. This allows you to retrieve accession and description records by searching for related data such as creator, source, and subject names; subjects; deaccession dates, and location. Resources can also be retrieved by searching for a specific instance type.

The searching features in the Archivists' Toolkit are primarily designed to support archival staff needs, though there is nothing to preclude a repository for allowing patrons to search the Toolkit directly if they choose.

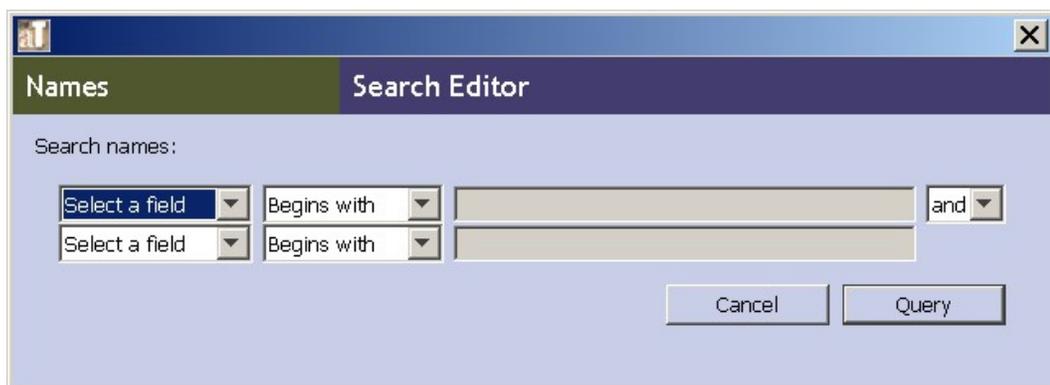
Note: The Toolkit's search interface includes a number of search fields by default, but these can be customized by the repository. A list of the default fields in the search editor is available in the appendices. More information about customization is available in Chapter 16.

Basic searching in all records

The Search tool provides the ability to search within a specific field, apply specific search operators, and create Boolean queries when searching any type of record.

To retrieve a subset of records using the search tool:

1. In the left hand navigation pane of the main screen, select the functional area containing the records you wish to view.
3. Press **Search**.



The screenshot shows a software window titled "Search Editor" with a "Names" tab selected. The interface includes a "Search names:" section with two rows of search criteria. Each row consists of a "Select a field" dropdown, a "Begins with" dropdown, a text input field, and an "and" dropdown. At the bottom right, there are "Cancel" and "Query" buttons.

4. **Select a field** that you wish to search within.

Note: In any of the functional areas, you can search for information about record creation and updating, through the **Created**, **Created by**, **Updated**, and **Updated by** fields. **Created** and **Updated** refer to the date the record was created or updated. **Created by** and **Updated by** are fields for the username of the person who performed the creation or update.

In addition, each area has a list of additional fields that can be searched. These fields can be customized. See Chapter 16 for more information. See the appendices for a list of default searching fields for each functional area.

3. Select a search operator. Options are dependent upon the type of field being searched:
 - Options for text fields include:
 - Begins with
 - Contains
 - Equals
 - Is Not Equal To
 - Is Empty
 - Is Not Empty.
 - Fields associated with lookup lists offer the following options:
 - Equals
 - Is Not Equal To
 - Is Empty
 - Is Not Empty.
 - Integer and date fields provide the following search operators:
 - Equals
 - Is Between
 - Is Greater Than
 - Is Greater Than or Equal To
 - Is Less Than
 - Is Less Than or Equal To

Note: Date searching requires that the date(s) entered be in the format established for the application. If you enter a date in the wrong format, the Toolkit may try to convert that date to the appropriate format, leading to an unexpected search. To ascertain the appropriate format for a date search, put any letter in the field and press the **Search** button. The Toolkit will return an error message giving the proper date format.

For information on establishing a date format for the Toolkit, see Chapter 16.

- Yes/No fields provide only true or false search options.
6. Enter or select a search string. Options are dependent upon the type of field being searched, and in some cases the operator:
 - Fields associated with lookup lists will provide the lookup list so that you can select the search string. All other text, date, or integer fields provide a search box for you to enter the search string.
 - Selecting the operator *Is Between* will result in two entry boxes, the first for the earlier number or date, the second for the later number or date. This search is inclusive, so that the begin date 1/1/2006 and end date 12/31/2006 will retrieve all actions for the year 2006.

Note: The search string in date fields must follow the date format established for the system as a whole.

7. If desired, select a Boolean operator (and/or) and enter a second set of search options.
8. Press the **Query** button immediately below the basic query fields.

Tip: The Search tool has "sticky" values in order to allow you to easily refine a search. This means that once you have performed a search in a functional area, your search values will remain the next time you press the Search button for that functional area. The last search performed for a given area remains until the application is closed and restarted.

If you wish to quickly clear a search, open the first drop down box and select **Select a field**, which will clear all values for that part of the query. If you've created a Boolean query using both sets of search options, you will need to repeat this operation in the second part of the query as well.

Linked record searching in accessions and resources

For accession and resource records, the Search tool also provides the ability to retrieve records by searching for related information. This includes names (creators, sources,

subjects), subjects, location, or deaccession dates. In addition, you can search for resources containing a specific instance type, for example, digital objects.

Note: The two search areas of the query editor for Accessions and Resources operate independently of each other. It is not possible to combine search parameters from the top and bottom areas of the screen.

To search by linked records:

1. In the left hand navigation pane of the main screen, select **Accessions** or **Resources**.
2. Press **Search**.

The screenshot shows the 'Search Editor' window for 'Resources'. It features two main search sections. The top section, 'Search resources:', allows for two parallel search criteria. Each criterion consists of a 'Select a field' dropdown, a 'Begins with' dropdown, a text input field, and an 'and' dropdown. Below this are 'Cancel' and 'Query' buttons. The bottom section, 'Search by linked record:', provides five search options: 'Find by name' (text input, 'Lookup', 'Clear', 'Function' dropdown), 'Find by subject' (text input, 'Lookup', 'Clear'), 'Find by location' (text input, 'Lookup', 'Clear'), 'Find by deaccession date' (two text inputs with a hyphen), and 'Find by instance type' (dropdown). This section also includes 'Cancel' and 'Query' buttons.

3. Use the follow instructions to enter data into the **Search by linked record** area found in the lower half of the **Query Editor** window. Entering data into more than one of the following areas will create a Boolean "and" search of the values entered.

Find by name:

- a. To search for creator, source, or subject name, press the **Lookup** button next to the **Find by name** search box.
- b. Use the scroll bar to browse through the names, or the **Filter** box to narrow down the list.

- c. Once you've located the desired name, select it by double clicking on the name or by clicking the name once and pressing the **Select** button. The **Find by name** search box will now contain the desired name.
- d. If you wish, you may also select a specific **Function**, either Creator, Source, or Subject.

Find by subject:

- a. Press the **Lookup** button next to the **Find by subject** search box.
- b. Use the scroll bar to browse through the subjects, or the **Filter** box to narrow down the list.
- c. Once you've located the desired subject, select it by double clicking on the name or by clicking the name once and pressing the **Select** button. The **Find by subject** search box will now contain the desired subject.

Find by location:

- a. Press the **Lookup** button next to the **Find by location** search box.
- b. Use the scroll bar to browse through the locations, or the **Filter** box to narrow down the list.
- c. Once you've located the desired location, select it by double clicking on the name or by clicking the name once and pressing the **Select** button. The **Find by location** search box will now contain the desired location.

Find by deaccession date:

- a. There are two **Find by deaccession** search boxes, one for the begin date and one for the end date. Enter the earlier date in the first box, following the preferred date format for the application.
- b. Enter the later date in the second box, following the preferred date format for the application.

Find by instance type (for description records only):

- a. Open the **Find by instance type** drop down list.
- b. Select the type of instance for which you wish to search.

Note: Searching by instance type may require more time than other types of searches.

4. Once you have populated the desired fields, press the **Query** button immediately below the linked record query fields.

Tip: The Search tool has "sticky" values in order to allow you to easily refine a search. This means that once you have performed a search in a

functional area, your search values will remain the next time you press the Search button for that functional area. The last search performed for a given area remains until the application is closed and restarted.

If you wish to quickly clear a linked record search, press the **Clear** button next to the appropriate field.
